

### Policy learning and transfer in regional lifelong learning policies

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Veröffentlichungsversion / Published Version  
Sammelwerksbeitrag / collection article

Zur Verfügung gestellt in Kooperation mit / provided in cooperation with:  
W. Bertelsmann Verlag

#### Empfohlene Zitierung / Suggested Citation:

Federighi, P. (2007). Policy learning and transfer in regional lifelong learning policies. In P. Federighi, C. Abréu, & E. Nuissl von Rein (Eds.), *Learning among regional governments: quality of policy learning and policy transfer in regional lifelong learning policies* (pp. 9-36). Bielefeld: W. Bertelsmann Verlag. <https://doi.org/10.3278/6001857w009>

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## Policy learning and transfer in regional lifelong learning policies

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DOI: 10.3278/6001857w009

Erscheinungsjahr: 2007  
Seiten 9 - 36

**Schlagworte:** Bildungspolitik, Erwachsenenbildung, Kommunalpolitik, Weiterbildung

The context of this research is the study of the processes whereby the effectiveness of training and lifelong learning policies are improved. This covers, in particular, the area of research into the policy-making procedure adopted by the regional governments. Regional policy-making is the outcome of formalised standards and procedures, and does not depend on legal, contextual or cultural variables, or combinations thereof, which differ considerably from context to context.

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### Zitiervorschlag

Federighi, P.: Policy learning and transfer in regional lifelong learning policies. Bielefeld 2007. DOI: 10.3278/6001857w009

# 1. Policy learning and transfer in regional lifelong learning policies

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## 1.1. Subject

The context of this research is the study of the processes whereby the effectiveness of training and lifelong learning policies are improved. This covers, in particular, the area of research into the policy-making procedure adopted by the regional governments. Regional policy-making is the outcome of formalised standards and procedures, and does not depend on legal, contextual or cultural variables, or combinations thereof, which differ considerably from context to context.

The first requirement of regional policy making arises from the fact that it operates within the framework of the relative margins of autonomy deriving from the institutional architecture of the State. Clearly, these margins also differ enormously according to the degree of centralism or federalism of the State model. Whether the regional governments can create independent policy-making procedures, or will merely implement national policies, depends on such characteristics. As a consequence, the term “Regional Government” itself may have a different semantic meaning. A study carried out by the Committee of the Regions (Europäisches Zentrum für Föderalismus-Forschung, 2002: 17 et seq.) made reference to four different classification types of concepts of ‘regional government’ present in the Europe of 15: federal states, regionalised states, decentralised states (all at three levels) and two-level states (lacking in a regional governmental level). In this research we shall restrict ourselves to regional governments understood as: *the level of government controlled by bodies democratically elected by the people, immediately under the national government and relatively autonomous (as regards politics, legislation – at least basic level norms –, administration and finance) with regard to building lifelong learning policies.*

From the point of view of the quality management of policy-making processes, there is a difference between the processes adopted by the governments for the mandatory transfer of policies established by the central government and the policies drawn up at a regional level, whether in the framework of standards or national guidelines. In the case of compulsory policy transfer, the quality models, the processes and procedures form part of the national policy norm and are imposed via incentives and disincentives normally of financial (rewards or penalties, etc.) and moral (fame and shame, etc.) types. This is all the more accentuated the smaller the degree of vertical governance and subsidiarity. In the case of autonomous policy making, the definition of the device to be adopted depends on the regional government itself, still in the framework of the institutional norms and procedures that regulate the general action of governing (the procedure of working out strategy and policy, of decision-making, planning, programming, implementation, monitoring, assessment, etc.).

Within this procedure lies an aspect which deserves careful study and management: the introduction of elements of change/innovation into the policies governing training and lifelong learning in general. How does it happen that new measures are introduced in the field of education, post-secondary training, for example, regionally? Or new measures facilitating the access of the unemployed to training?

Understanding how to support the development of the processes of change and innovation and how to ensure that the elements of change introduced are implemented in a framework of high-level management and effectiveness is one of the objectives of this research.

The lifelong learning policy innovation procedures may be generated either locally (in an in-house fashion) or in the relationship to a range of subjects and situations into which innovation is introduced (externally). In both cases consideration must be paid to the effect of the network of relationships, or of the network of dynamic learning which has accompanied the course of the innovation of the policies. There are basically two reasons for making this choice.

In the first place it must be borne in mind that the process of innovation is still influenced by external factors and that therefore the control and management of this variable confers a higher quality on the process itself. In the second place we can hypothesise that every innovation may be seen as the development or adaptation, albeit partial, of previous policies implemented by some government, in some part of the world, at some moment in the past. Therefore the control and

management of this variable also improves the quality of the actual process, in particular because it offers the possibility of making use of the results of prior implementations and increases the possibility of predicting the effect. This is the reason why we have adopted cooperation or coordination between various regional governments in our research as our field of study and collection of empirical material. The fact that these are spread out throughout different European countries will further enrich the study.

Since our area of study consists of regional autonomous policy-making, we should concentrate above all on the progress of political understanding within the institutions, which produce innovative intentions and ideas which then generate, in turn, the processes of transfer, adaptation and absorption of the innovations themselves.

On this basis we believe it is possible to work out a detailed model of the management of the innovation of training and lifelong learning policies in general which should be based mainly on voluntary and self-governing methodologies which are able to be adapted to the institutional norms and procedures existing in each regional government. It is for this reason that we proceed in accordance with the theory that the model of a soft Open Method of Coordination (SMOC) between regional governments, permanent and concentrated on essential functions, may be what is required. This will help increase the innovative capacity of the regional governments, given the fact that "in this emerging global commons, the governments which are quickest on their feet, most willing to adapt and learn, will be the ones that serve their citizens best" (Mulgan, 2003:6).

## **1.2. Institutional policy learning**

### **1.2.1. Definition of some key concepts**

The first question to be tackled concerns the way in which the regional governments learn or identify the innovations to be introduced in their policies and build them into their compendiums of knowledge, which may ultimately reach a position in which they may be adopted. We move on from this type of question, since the research carried out confirms the fact that institutional learning is not exclusively connected to the moment of policy transfer, but, particularly in the case of autonomous policy-making, comprises different moments. In a linear perspective, the learning process begins a long time before the occurrence of the transfer, and, clearly, proceeds in a range of forms in this phase as well.

Some researchers propose the socio-constructivist paradigm to explain institutional policy learning wherein “learning is a way of being in the world and not a way of coming to know about it” (Nedergaard:10). This approach has caused a number of authors to see the two moments of learning and transfer as a whole. The approach is better justified if framed in cases of compulsory policy learning and transfer (for example, in the European policies connected to the admission of new members into the EU). What actually happens here is that learning is revealed by the changes effectively introduced into commercial and social policies relating to human rights, etc. The problem may be posed in a different way in our research where the “transfers of ideas or programmes are underpinned by deeper and prior processes of learning” in an unmistakable way (Knoepfel & Kissling-Näf, 1998: 346, quoted in Stone: 9).

In this respect it would appear more useful to refer to what is known as the ‘new institutionalism’ (for example, Radaelli 2000; Freeman & Tester, 1996) who “have adopted a processual perspective which goes beyond the mechanical transfer model”. (...) This approach emphasises the aspects of political life, which are taken-for-granted where actors follow rules, shared interpretations, schema and meanings (Stone:3).

The concept of policy learning still needs to be gone into in greater depth in order to better understand the meaning applied to the specific context. The term ‘learning’ is not particularly clear when it is required to refer primarily to the biological and cultural processes which take place in the individual when in a training situation.

One way in which this is relevant to our area of study may refer to the outcomes in terms of (substantive) learning acquired by the individuals and institutions involved in policy innovation learning processes. As a consequence we should consider the learning outcomes achieved by the individuals who have taken part in the process (and who will go on to enrich their personal knowledge or the intangible background of knowledge possessed by the organisations) from a different point of view from that of the learning achieved by the regional institutions which, however, only exist if translated into political decisions expressed in instruments of various kinds.

The processes which lead to (or accompany) the attainment of these results are made up of a series of educational and training actions explicitly aimed at and structured by the fulfilment of predetermined learning objectives, or of actions of an informal nature, simply entrusted to the dynamics of political interaction. As a consequence,

the purpose of policy learning (and the detailed model to be constructed) does not comprise individual learning, but educational and training actions whereby the institutions acquire ideas while they are being translated into political action.

In our opinion this approach is more effective for the purpose of giving “legitimacy to recourse to knowledge in decision-making processes, whereby they become more open, transparent and responsible” (Liberatore e Funowicz, 2003, quoted in Vesan, 2006:5) and so that “the cognitive processes (...would be...) reassumed within a political process which, for this reason as well, becomes more transparent and inclusive” (Vesan, 2006:4).

### 1.2.2. The actors

In terms of governance and, in particular, of horizontal subsidiarity, the actors involved in policy learning are identifiable with all the other players in civil society. Mulgan fairly points out that “smaller entities are more attuned to their external environment, aware that it will shape them more than they will shape it, less attached to the illusions and complacency that scale breeds. (...) they are closer to the fields where much of the best innovation is coming from: the non-profit movement, social entrepreneurs, and the businesses in the new economy. The conclusion is clear: in looking for promising approaches to social care, or housing policy, for transport, it is vital to look beyond the large western nations” (Mulgan:4). As Stone states (21), at the source of the policy learning process we often find “a transfer broker or policy entrepreneur. International organisations, think tanks, consultancies, law firms and banks often perform this role”. But at the heart of governance lies the role assumed by the primary players in institutional policy, or by those who are responsible for innovation in public policy. One study concludes with the statement that “one can say that the peer reviews, which are supposed to support learning processes, are not constructed so that a learning process could be carried through on an organizational level, that is within and across ministries and states, and not only for individuals. This is so because the dissemination of documents, experiences and approaches is not followed through in any systematic way and because people with decision-making power are largely absent from the peer reviews” (Kröger, 2006:13).

At the other end of the spectrum we may quote the case of Kawaji Toshiyoshi, “the ‘father of the Japanese police’ who, as head of the Tokyo force, was sent to Europe in 1872 to examine how the French model could provide the basis for reform in Japan” (Westney, 1989:40-43, in Page: 3)

At the institutional level the problem consists of involving the operators driving the process of institutional innovation who are directly responsible for policy making in education and training policy. This solution makes it possible to overcome the division, even the opposition, between individuals and institutions, and hence the nexus between policy learning and policy transfer.

The key players in a regional government who underpin this nexus are represented by those to whom the task and power of “thinking the unthinkable” (Bernstein, 1990) has been entrusted, or rather by the institutional innovation operators. The nature of the individuals in question varies depending on the subject matter in hand and the level of transformative impact attained and who are essential to the political heads and their first-level officials (directors general, advisors, etc.).

### **1.2.3. The transnational networks of dynamic learning**

Policy learning and to an even greater extent the introduction of innovative elements is always the product of an action undertaken within a network of relationships. By this we do not mean solely the totality of entities obliged by law to participate in the decision-making processes (enterprise parties, associations, etc.), but rather the formal and non-formal networks of individuals, both inside and outside the institutions, which prepare the ground for the decisions. In this respect Crouch examines the function of lobbies, seen as a reality which undermines the bases of the current model of the democratic state (Crouch, 2003). As far as the specifics of policy learning are concerned, the problem for regional governments consists of participation in the networks which produce “political awareness” and which are able to energise joint actions capable of producing innovation. This necessity is seen as even more evident at the international level, in that what is concerned here is a dimension, which in recent decades has steadily increased its own influence on local policies. This has been taking place both at a normative and cultural level, in step with the political actions of the international organisations, and at the general economic level, since the moment when the capacity of a Region to create the conditions for development and economic and social growth was sanctioned by the international investors rather than by the evaluations of the superordinate institutions.

For this reason our research has dealt solely with the role of the transnational networks. Even so, the model of soft OMC is certainly suited to cooperation between the regional governments of the same State.



In regional policy learning, the networks consist of the players involved in the processes of institutional innovation directly involved in policy making. They are, however, networks of equals, the membership of which varies according to the subject in hand, the level of technical detail attained and the time. These networks are not, in fact, permanent in nature. Their existence is related to the learning project and they remain so related, according to need, until the project is completed. This by no means implies that there are no useful institutional networks that are permanent in nature. On the contrary, such networks may constitute the vehicle that encourages the creation of networks for policy learning. These latter, however, display other characteristics: they emerge among equals in response to a shared need to develop knowledge related to political action, and they last the length of time needed to complete the task of selecting the policies to be transferred. It is because of their tendency to support the dynamic of institutional learning and to be based on an exchange of knowledge that we define them as networks of dynamic learning (an expression already adopted from Reich).

In the first place, these networks base their operations on their ability to produce learning processes within the participants, meeting the specific needs of each one: “networks are a structural framework for policy oriented learning” (Knoepfel & Kissling-Näf, 1998: 347). This means that it is not only subject-based networks, characterised by common interest, which arise within the same political ambit (lifelong learning, in our case), but knowledge exchange networks on a range of subjects also appear. In this way all the members of the network determine their own spheres of interest and receive from their partners the support that is required to that end. The metaphor of policy learning like that of policy transfer may lead to error: in neither of the two cases is there necessarily a distinction between the teacher and the learner, or between the person importing and the person exporting. Given that we are operating in the field of learning oriented towards political action, we are, for the most part, dealing with co-operative learning situations. For this reason the networks should define and share a common ‘discourse’: a language, a method, instruments, and organisation, etc. In this sense political dynamic learning networks may also be seen as ‘epistemic communities’ (Haas, 1992) from the moment when, at least to some degree, they “are founded upon ‘consensual knowledge’ and learning is prompted by scientific knowledge advanced by experts”, and which, at least temporarily and in part, they “have similar professional beliefs and standards of judgement and share common policy concerns” (Evans and McComb, 1999). At the same time it is possible to talk about ‘discourse coalitions’ (Hajer, 1993), which place considerable emphasis on shared constructs and a common policy language” (Stone, 2000:16), but we shall return to this in due course.

In the second place, political dynamic learning networks are, of necessity, focussed on action. These networks are a forum in which “a process of social learning expressed through policy” (Heclo, 1974: 305-06)” occurs, and Stone (10) adds that “learning occurs when policy-makers adjust their cognitive understanding of policy development and modify policy in the light of knowledge gained from past policy experience”. This means that political dynamic learning networks contain within their structure, or in the transfer of policy, the main indicator for measuring success, an element which distinguishes them from other types of network (directed towards seeking or training personnel).

It is this second characteristic which makes the existence of networks essential. It is not only policy learning for which they are indispensable. The literature, meetings of various kinds and consultancy already help to circulate new ideas. But the fact that they are necessary arises at the moment in which the intention is formed to move from knowledge to action directed at policy renewal. This is where benchmarking, knowledge of the details of the solutions adopted, first hand assessment, is useful. Hence, when study at last emerges as transformative action, the need to be provided with partners with whom the procedure and future practice will be built becomes even more relevant. In the field of training policies and of lifelong learning in general there are areas in which transnational cooperation is an integral part of the same policies. Examples are the policy of mobility for reasons of study or work, or cooperation in the field of distance learning or the production of open source software, regarding which this research provides concrete case studies.

Political learning via the networks has the power to upgrade the quality and effectiveness of the successive actions of innovation and change in local policies. Depending on the way in which this is assessed, or even because of the fact that it is not assessed, it is permissible to hypothesise as to whether the probabilities of success of a political action are greater or less. For this reason the activation of political dynamic learning networks and the associated processes should be seen as part of the policy-making processes, thus endowing the raft of knowledge which underpins the political decisions with transparency and legitimacy.

### **1.2.4. The political fields under comparison**

Depending on the choice of the policy field to be employed to initiate the policy learning process, the results achievable may vary considerably.

Here we have associated policy learning – learning directed towards political action – with the margins of autonomy in respect of policy-making by the regional governments. This decision helps to define a more precise field of work, free of the risk of reducing the range of the action to a simple upgrading of the skills of the individuals concerned, important though that may be.

A further variable arises from the type of policies under consideration, from the moment when, as we mentioned before, policies and fields exist in which policy learning processes orientated towards the introduction of innovations or simple changes are more feasible and where the added value of transnational cooperation is more significant. The problem is particularly significant for research such as ours, which focuses on the field of lifelong learning, one of the more complex areas and, not by chance, only marginally and partially touched on by the EU treaties from Rome onwards (Varsori, 2006).

In this respect we believe it is appropriate to adopt the distinction that Mulgan makes between the three difference types of policies:

### ***Stable policy fields***

“... composed of areas where knowledge is settled; governments broadly know what works; there is a strong evidence base; and the most that can be expected is some incremental improvement. (...) The professional bodies and leading experts can generally be relied on to give good advice; we can quite easily benchmark ourselves against the best; and good innovations tend to spread fairly quickly through formal networks”.

### ***Policy fields in flux***

“ ... belongs to areas where most people recognise that things need to change; that policies which once worked are no longer working. In these areas – a fair amount of education, welfare and pensions, the organisation of public services – there is often a great deal of fertility and experimentation. However, evidence, which is by its nature backward-looking, is often not very useful. It may reveal the weaknesses of policy. But it is unlikely to give convincing evidence about what works. The professions in these fields are often as much part of the problem as the solution, and may be resistant to criticism. In these areas comparisons are essential, but they are more like explorations which provide insights”.

### ***Inherently novel policy fields***

“... consists of areas of inherent novelty: biotechnology and its regulation; e-government; privacy on the net; new forms of governance at the European or global

level. No one knows for sure what works or what doesn't because these are virgin territories; the pioneers are likely to make the most mistakes; the experts will only be just ahead of the amateurs. The task of good government is to keep a very close eye on what is and isn't working, so that we can at least reduce the proportion of mistakes we make" (Mullan, 2003: 3-4)

Mullan's realism regarding the problems of innovation in educational policy is understandable. However, it is assumed, despite the strong resistance shown by various stakeholders, that lifelong learning would also perhaps be included among the "inherently novel policy fields". It is certainly an area that is largely unknown, and in respect of which there are very few people able to, for example, calculate with any degree of accuracy the weight of the free market and the kinds of policies that can guarantee a governing role for the public institutions (consider, for example, the ignorance of the OECD data revealing the marginal incidence – never more than 15% – of public finance in encouraging participation in learning for adults (Ministère de l'industrie, Statistique Canada et Organisation de Coopération et de Développement Economique, 2005))

### **1.3. Policy learning units**

#### **1.3.1. Two purposes**

With regard to the processes governing policy learning of a voluntary nature the choice of the subject of study is defined by criteria established by the "importer" on the basis of assessments based on necessity, possibility and the will of the actual institution.

There is nothing to say that such choices will not be influenced by references to external reasons, such as a comparison with the performances of other Regions, for example. But benchmarking alone is not the central subject of the learning process; it can only be an additional motivation. Nor is the solution to be found in a collection of best practices: actions worthy of respect, but which are difficult to export, when they are not selected, because they are "the ones with impressive public relations but which don't actually work" (Mulgan, 5). The hesitant judgment expressed by Arrowsmith extends to the whole machinery of the technicistic tradition: "defining 'best practice' is no easy matter, especially when there are several and potentially conflicting policy goals. Data have to be collected and collated in comparable terms, and where benchmarking is cooperative, reaching agreement on the most appropriate

bases can be difficult, especially if it involves significant changes to existing reporting arrangements. Agreement must be reached on the definition of measurable variables that deliver comparisons of like with like; the contingencies and timing of the exercise; and allocation of responsibility for the initiative and its coordination. All this is to be resolved before the issue of implementation of findings can be addressed. The process is therefore costly in terms of financial resources and time, and with no guarantee of clear benefits at the end (Arrowsmith: 320).

What is paramount in policy learning is neither benchmarking, nor best practices, but a “complex mixture of ideas, issues, compromises and practices that go to make up ‘policy,’” (Page:4).

Having stated the matter thus, the necessity still remains, however, to identify the formal components of policy learning, those upon which the subjects involved are based.

The problem has been solved by Dolowitz in his identification of the following types of category of objectives: (i) policies, (ii) institutions, (iii) ideologies or justifications, (iv) attitudes and ideas, and (v) negative lessons (Dolowitz, 1997a). Mulgan simplifies this categorisation by identifying the components, or rather the units of policy learning with ‘concepts’: “What spreads is a concept – or, if preferred, a policy meme – that diffuses widely through example, and in due course through a rather blunt process of natural selection. These concepts are not the same as their application. All policy ideas have to be adapted to different cultural and institutional environments, improved and reshaped until sometimes their origins are unrecognisable. But it is the concept, often in a rather pure form, that spreads. In the past generation alone, there are some striking manifestations of this: monetarism; quasi-markets for health; public service broadcasting; equal opportunities; renewable energy; regulated utilities” (Mulgan: 2).

This definition reduces the components to two main categories: on the one hand are the ideas (the concepts, the ideologies, the policies), and on the other the examples thereof, or rather the way they are applied, the instruments used to implement them and which we will define with the term “measures”.

The study of the policy ideas is a process which depends on the ability of the institution to locate itself within the world of development and research, in our case into lifelong learning policies. The ability of an idea to travel (Rose: 1993) must be combined with the ability of an institution to find that idea. The history of the spread

of the idea of “lifelong learning” is worthy of attention, an idea which appeared in the first half of the nineties, and then spread rapidly, at least at the level of an idea. This is a symbolic example of how the same concept appears to be present in all national and regional policies, but the application of which varied considerably from context to context, and not only because of matters concerned with political will, but also because of the different historical stage of the development of education and training itself. Other examples come to mind, such as the concept of employees’ right to receive training and education, how it developed from the forties until June 5, 1974 when at the International Labour Office General Conference, session 59, when agreement No.140, converted it into a right and provided it with a standardised formula. There are further examples of the spread of an actual idea concerning adult education during the second half of the twentieth century, or of the idea of the ‘policy of demand’ in learning. These examples help us to understand first and foremost how, when we consider the question of political ideas in movement, we should bear in mind that a two-fold dimension applies: that of the history of the idea, and that of its terminological and semantic variation. We find ourselves, in fact, in a field in which, depending on the country, the same meanings do not attach to the same terms, or where identical semantic content corresponds to different terms, or again where some ideas and some terms are completely absent. This latter case is particularly relevant when it is difficult to proceed to the policy transfer of measures towards where the idea that these contexts are the implementation of such measures is absent (transferring the individual learning account in a context where the idea of demand policy does not yet exist is certainly difficult, if not actually impossible).

The study of measures is the concrete area of comparison of the actions undertaken and the results achieved. It is therefore the area where analysis, comparison and assessment are more feasible and the subsequent transfer simpler. This is because a measure may be seen as the specific ideal purpose of an exercise in “lesson drawing – ‘searching’ for sources of lessons, ‘making a model’ of how the policy or practice works in situ, ‘creating a lesson’ by assessing what can be extracted from the practice in the exporter jurisdiction to produce the desired results in the importer jurisdiction and ‘prospective evaluation’ of the way in which the policy or practice are likely to work in the importer jurisdiction and adaptations needed to make it work” (Rose,1993, quoted in Page: 9)

### **1.3.2. The concept of measures**

The concept of measures is widely used in the field of labour policy to identify the instruments by means of which actions are undertaken for the purpose of impro-

ving the flexibility of the labour market and maintaining the income of the unemployed, etc. It is also used in the ESF Regulations and planning documentation where “measure” is seen as “the instrument whereby (a priority) is implemented over a period of years and justifies the financing of the operations”.

It has only recently been adopted in the area of education and training. We have adopted the term “measure” here instead of its possible synonyms such as provision or stipulation. The reasons being that it refers in a more explicit way to a particular action intended to achieve an effect and to the objective of ensuring that the results achieved are measurable.

Measures are seen here as the components of a policy through which the policy acts on a range of factors upon which it is intended to act (the beneficiaries, the roles of the various players, the costs of the education and training initiatives, conditions of access thereto, the tasks involved in the systems concerned, the categories of activities accepted, content, instruments implemented, etc.). In this sense, measures comprise an action model which gives coherence to the various factors recorded. Hence study permits paid for by employees constitute an example of a measure, which defines in detail all the factors listed above.

The need to pursue more objectives gives rise to the addition of more measures, each of which aims at producing complementary effects. A study grant is a simple measure, but grows when, for example, it is incorporated into a complex of coherent and related measures (study loans, accommodation, etc.) which together comprise the policy of the right to university study. The specific effects of a measure are determined by the relationship it has with other measures.

As we said above, a measure is intended to determine the model of interaction between the various components of a situation, such as the type of training designed for the top management of a company, the payment of the direct costs, the bodies authorised to provide it, the research and innovation plans of the company itself and career development. To perform these functions, the measures operate on the pedagogical device acting in every type of context, whether formal, non-formal or informal: the place of work, the training centre, the employment centre (Bernstein, 1990).

With the concept of the pedagogical device we identify the explicit and implicit rules which precisely govern the relationships between the various components of a context (persons, training activities, systems, etc.) The rules which have a determinant weight over the others are those of a distributive nature. It is the

distributive-type rules that determine who can transmit something, to whom and under what conditions, and, moreover, who may have access to the “thinkable” and the “unthinkable”, in fact within what period of time it will already have been reproduced and the effects are foreseeable and to what extent it assumes the nature of the probable and incorporates innovative processes within a company, an association, in whatever context. In the final analysis, the distributive rules, aside from access, “control the possibilities of the unthinkable and who can think it.”

From this we can draw two consequences: in the first place we can state that the measures of the policy define distributive rules above all; in the second place that there are various categories of measure (classified here according to their function in allowing access to the “thinkable” or the “unthinkable”).

Assuming the measure as the minimum unit for the study of a policy helps us to isolate the individual rules of the device of which the measure forms a part and should facilitate for our benefit the assessment of the effects, both at the level of the specific measures and at that of the combination of measures.

This is an approach the European Union has adopted in respect of new perspectives for the rational management of education and training policies (European Commission, 2005). And this has occurred in the wake of the initiatives taking place beforehand at UNESCO (Bélanger and Federighi, 2000), then within the OECD (1996 and 2005), the World Bank (World Bank, 2002), the ILO (2003) and then ISFOL-Istituto per lo Sviluppo della Formazione dei Lavoratori – Institute for the Development of Worker Training, 2006).

### **1.3.3. The policy learning method**

The problem arising with policy learning method immediately reveals a two-fold requirement: on the one hand, the need to adopt an open approach to the quest (rather than search), and on the other the need to guarantee a device that permits the communication, the collection and the organisation of results of use for political action.

The initial methodological orientation is a response to the fact that policy learning appears as a study that has been thoroughly completed: understanding how to improve one’s own performance. In these cases what prevails in the final analysis is a kind of “Methodological opportunism (which) selects constructional tests that fit specific analysis, and ignores the evidence that can be provided by using other



criteria that do not match the expectations of the analyst” (Croft, 2001: 45). The policy-making players who form a part of the network for the purpose of understanding which ideas and which policies are worthy of consideration are not concerned with the formal coherence of their procedure, nor can they be constrained to operate within such a method, even if it is seen as the most suitable with regard to the subject.

The dilemma is not unlike that faced by Solow in Stockholm, on the occasion of his *Lecture to the memory of Alfred Nobel* (1987), when, on the subject of economic research, he noted that the gathering of historical data series “does not provide a critical experiment. (...) we have no choice but to take seriously our own direct observations of the way economic institutions work. There will, of course, be arguments about the *modus operandi* of different institutions, but there is no reason why they should not be intelligible, orderly, fact-bound arguments. This sort of methodological opportunism can be uncomfortable and unsettling; but at least it should be able to protect us from foolishness”.

In our case it is the nature of policy learning – autonomous and voluntary and highly suited to the action – which inevitably displaces it into the area of methodological opportunism where, given any standard whatsoever, however “basic” or “necessary” it may be for science, circumstances always arise in which it is convenient not only to ignore the standard, but to adopt its opposite. For example, there are circumstances under which it is advisable to introduce, develop and defend ad hoc hypotheses, or hypotheses that contradict well-established and universally-accepted experimental results, or hypotheses the content of which is reduced in comparison with alternative hypotheses in existence which are empirically adequate, of, again, internally-contradictory hypotheses (Feyerabend, 1975)

The methodological orientation serves to offset the uncertainties of methodological opportunism via the definition of shared methods and instruments in the support of co-operative and transformational learning.

The starting point is the adoption of the Open Method of Coordination (OMC) launched with the Lisbon strategy created “by avoiding centralised supranational governance, the OMC shall enable European politics to effectively deal with strong national diversity” (Commission, 2002). But at the same time, this search aims to define a “soft” model, one which is capable of supporting the policy learning and policy transfer processes between the Regions in a more effective way.

The OMC was defined by the Portuguese Presidency in its conclusions from the European Council as a method involving a specific set of elements:

- fixing guidelines for the Union combined with specific timetables for achieving the goals which they set in the short, medium and long term;
- establishing, where appropriate, quantitative and qualitative indicators and benchmarks against the best in the world and tailored to the needs of different Member States and sectors as a means of comparing best practises;
- translating these European guidelines into national and regional policies by setting specific targets and adopting measures, taking into account national and regional differences;
- periodic monitoring, evaluation and peer review organised as mutual learning processes.

As De la Porte, Pochet and Room claim (2001: 302) “The OMC can be characterized as a ‘post-regulatory’ approach to governance, in which there is a preference for procedures or general standards with wide margins for variation, rather than detailed and non-flexible (legally binding) rules”. The establishment of the OMC is based on the practice of benchmarking, peer review, cyclical follow-up of results and built-in feed-back mechanisms.

Radaelli, one of the researchers who has contributed most to the development of this concept and the OMC model, locates it in the framework of the process of “Europeanisation” guided by “Soft law relates to rules of conduct that are not legally enforceable but none the less have a legal scope in that they guide the conduct of the institutions, the member states and other policy participants” and which advance a much more voluntary and non-hierarchical process (Bulmer and Radaelli, 2004:7-8). The comparison offered by the authors with other models of governance shows how the OMC is characterised by its orientation towards coordination, policy exchange, and the adoption of horizontal relationships methods (see fig. 1 from Bulmer and Radaelli).

However, the adoption of the OMC in intra-regional cooperation cannot be reduced to mere transposition. The initial problem derives from the fact that the way it is currently being developed is connected to experiments mainly involving the national levels, excluding in particular regional governments from the lifelong learning field, and including actual decision makers only in rare cases. This has certainly pushed it further in a technicistic direction (Delbridge et al. 1995; Tronti 1998; Schmid et al. 1999; Arrowsmith and Sisson 2001) and has not improved its relationship with policy transfer to the extent that some authors have described the

<b>MODE OF GOVERNANCE</b>	<b>TYPE OF POLICY</b>	<b>ANALYTICAL CORE</b>	<b>MAIN MECHANISM</b>
Negotiation	Any of those below	Formation of EU policy	Vertical (uploading)
Hierarchy	Positive integration	Market-correcting rules; EU policy templates	Vertical (downloading)
Hierarchy	Negative integration	Market-making rules; absence of policy templates	Horizontal
Facilitated co-ordination	Co-ordination	Soft law, OMC, policy exchange	Horizontal

Fig. 1 – Governance, policy and the mechanisms of Europeanisation

phenomenon in terms of the development of ‘audit cultures’ (Strathern, 2000) or even an ‘audit society’ (Power, 1997).

The solution lies in its diffusion and in its contemporary operational simplification to policy learning and to voluntary policy transfer between regional governments.

To this end research has aimed at the identification of the substantial elements of the OMC, that is, those which are essential for achieving the objective of voluntary policy transfer. This choice does not exclude the study of best practices – including with the contribution of ethnographic methods – and does not even exclude recourse to the most refined method of benchmarking based on historical series of data. Since learning OMC is not an end in itself, it needs to be subjected to a process of simplification to increase its functionality.

We hypothesise that the essential components of OMC in the policy learning phase may be identified in the following:

- regulatory mechanisms related to knowledge and meaning-making (Jacobsson, 2002: 14). These components refer to those social mechanisms which regulate the possibility of producing shared learning practices, mechanisms of the argumentative or analytical type, cooperative discussions and analytical practices which involve the various players and which go beyond epistemic communities (Vesan, 18), understood as communities of experts. “The discursive regulatory mechanisms I will look at include joint language-use (...); the working out of common classifications and common operationalisations

(indicators); the building of a common knowledge base (...); the strategic use of comparisons and evaluations; the systematic editing and diffusion of knowledge and evaluation results, combined with social pressure (...) and time pressure. The effectiveness of the non-binding regulatory mechanisms increases if combined with various types of pressure” (Jacobsson, 15). Furthermore, “language-use is important because it functions as to steer thought and focus attention, i.e. to frame conceptions of reality. The establishment of common language use and an interpretative framework is an achievement at the level of policy thinking” (Jacobsson, 17).

- the identification of some key steps by means of which it is advisable that the process be revealed. In the case of policy learning, we can hypothesise that the essential phases correspond to those appropriate to the political response to a social demand for education and training (Federighi, 2006), in other words:
  - expressions of the policy learning demand based on possibility, need and the will to make innovations in regional policy
  - access to the policy learning opportunities and in particular to dynamic learning networks
  - management of co-operative learning relationships within the networks
  - application of the learning outcomes in terms of modification/innovation of regional policies
- the availability of instruments which can be used to orientate and organise one’s own course of knowledge and action. This is the weakest aspect particularly in the field of training and lifelong learning in general, because of the low level of investment in specialised research into the policies in the sector. The essential instruments in support of policy learning may be limited to the following:
  - Updated databases which allow online benchmarking on some specific indicators. With good reason Koellreuter holds that “Regional benchmarking and continuous comparison with the competition require a collective readiness to keep on learning at all levels. It helps if changes in the relevant environment of the Region, and particularly those in competing Regions, are perceived. This improves the Region’s ability to develop a vision of its own and to put the framework conditions called for by that vision in place with the necessary speed. Finally, it makes monitoring the effects of the decisions taken that much easier” (Koellreuter: 9). The problem is that this type of service does not exist at European level and all that is available are some regional networks, and even they exist only in a very limited way) for example, the IBC database dedicated to the European Alpine Space Regions).

- Databases which can be updated in an acceptable period of time on the outcomes of policies and the individual measures adopted by the various governments at the different levels. Defining standard or reference points with respect to different aspects, objectives and effects of certain measures or policies (De La Porte: 25) is an essential component of OMC. Instruments for “monitoring and “exchanging information publicising performance”, “monitoring mechanisms” and on policy measures” are also seen as crucial by other authors (Héritier: 6 and 12). At the methodological level a number of researchers have striven for years to create instruments which aid comparisons (such as the ISCED research programme). The problem is that these indicators are not used for the systematic collection of statistics and the assessment thereof.

<b>Rose (1993)</b> Lesson drawing	<b>Owen (2002)</b> Process benchmarking steps	<b>Héritier (2002)</b> Development and implementation by voluntary accords	<b>Jacobsson (2004)</b> Discursive regulatory mechanisms	<b>Prevalet (2007)</b> Soft OMC
<b>“Searching”</b> for sources of lessons	Deciding what to benchmark	<b>Instruments:</b> target development plus timetables;	<b>Joint language-use</b> (key concepts and discourse)	Policy learning Institutional motivation
<b>“Making a model”</b> of how the policy or practice works in situ	Who to involve	Definition of contributions to reaching the target;	Working out of <b>common classifications and common operationalisations</b> (indicators)	Selection of pathways for institutional learning
<b>“Creating a lesson”</b> by assessing what can be extracted from the practice in the exporter jurisdiction to produce the desired results in the importer jurisdiction	Understanding the existing process	Monitoring mechanisms;	Building of a common knowledge base (including collection and standardisation of statistics)	Selection and analysis of measures
<b>“Prospective evaluation”</b> of the way in which the policy or practice are likely to work in the importer jurisdiction and adaptations needed to make it work	What information do you need? Devising your questionnaire	Sanctions in case of non-compliance.	<b>Strategic use of comparisons and evaluations</b>	Choice of the model for policy transfer

Rose (1993) Lesson drawing	Owen (2002) Process benchmarking steps	Héritier (2002) Development and implementation by voluntary accords	Jacobsson (2004) Discursive regulatory mechanisms	Prevalet (2007) Soft OMC
	Choosing a benchmarking partner	<b>Actor involvement and participatory structure:</b> targets and con- tributions set solely by private actors (self-regulation);	<b>Systematic editing and diffusion of knowledge and evaluation results,</b> combined with social pressure (peer pressure) and time pressure	<b>Policy transfer:</b> Setting up of institutional conditions for policy transfer
	First contact, Before the visit	Targets and con- tributions set jointly by private and public actors (co-regulation).	<b>Review, evaluation and control and temporal dis- ciplining</b> (‘deadlinification of practice’)	Policy transfer implementation
	During the visit, Collating, ana- lysing the information and planning			Institutionali- sation and follow up
	Making changes and Review			

Fig. 2. Main components in some pathway models of policy learning and policy transfer

## 1.4. Policy transfer between institutions

### 1.4.1 Two complementary definitions of voluntary policy transfer

The scientific literature contains a number of terms referring to policy transfer, such as ‘band-wagoning’ (Ikenberry, 1990), ‘policy borrowing’ (Cox, 1999) or ‘policy shopping’ (Freeman, 1999) and ‘systematically pinching ideas’ (Schneider & Ingram, 1988), or ‘rational shopping’, among which everybody chooses that which best meets their needs. (Bennett 1991; Westney 1987). From a historical perspective, policy transfer accompanies all the actions of colonial expansion or the widening of the borders of a country; this was what powered the spread of Roman Law throughout all the cities taken

over by ancient Rome and which made it possible for an Iberian or a Celt to declare *Civis romanus sum*.

It would seem that the process of Europeanisation has something in common with this past. The concept of Europeanisation refers to the progressive process of convergence and complementarity which should guide the institutional logic of the European integration process. The EU's institutional impact on national policies, politics and policies is a modern and diffused form of policy transfer exercised in an intensive way in respect of the countries, which are candidates to become members of the Union. In those areas in which member countries have reached an understanding in favour of convergence and complementarity, policy transfer becomes compulsory. It is not by chance that a study of the Czech Republic's process of becoming a member of the Union reads: "from all we know about the pre-accession strategy, the European Commission is certainly the dominant agent of transfer in this adaptation process (Schüttpelz, 13).

In our field, however, it is impossible to speak of the Europeanisation of training and lifelong learning policies in general; "the Europeanisation of social policy does not seem to lie in the institutional logic of the integration process" (Schüttpelz, 2). It is also for this reason that our research only deals with voluntary policy transfer, that is, transfer decided freely and rationally, in our case, by the regional governments concerned.

Before adopting a definition of the concept, we should, however, again consider the fact that "the policy transfer metaphor implies a direct exchange process between exporting and importing countries. However, there can be transfer agents that are not based in or identified with either the importing or exporting jurisdiction but which facilitate the exchange between a number of politics" (Stone, 21).

On this subject our research has shown how policy transfer undertaken in a co-operative way, carried out via the shared creation of policies and measures so far not in existence in any of the partner governments may constitute the most effective and rapid form of transfer.

For this purpose, the definition which we adopt in this research makes reference to two types of voluntary policy transfer. The first relates to policy transfer understood as "the transposition of policies and/or practices *already in operation* in one jurisdiction to another" (Page, 2). The second is understood as *co-operative policy transfer*, connected to the introduction of innovation in the policies and measures of a regional government, with a view to their total or partial incorporation, carried

out by means of joint planning and implementation, peer monitoring and the harmonisation of the progressively introduced changes.

#### 1.4.2. The specific components of policy transfer

The components of policy transfer, in theory, are the same as policy learning: on the one hand the ideas (the concepts, ideologies and policies), on the other, the measures (how they are implemented, the instruments used in implementation). In actual fact, however, we should bear in mind the fact that these components change their connotations the moment in which they come into play, that they move towards the innovation of a political system.

“In the study of transfer, ascertaining precisely what was borrowed is far more difficult to determine (*...we are again faced with a*) complex mixture of ideas, issues, compromises and practices that go to make up “policy” (Page: 4). Including in the case in which we are dealing with a simple case of the transfer of a policy from one country to another, the imported object loses many of its original characteristics because of the way it is slotted into another economic and social context. The example is given of the opposing functions, which the introduction of a measure such as the training voucher may assume depending on the context: democratisation of individual rights of access to training, or abandonment of the citizen to the dynamics of the free market in education and training.

Turning to the concept of the pedagogical device (Bernstein, 1990) we may take into consideration the *rules of recontextualisation* by means of which is determined the process whereby the learning content is grafted “onto a regulatory discourse which dominates it, recontextualises it within a predefined order, relationship and identity.” This order corresponds to the system of roles and powers that govern the process of the transfer of measures (the rules, the relationships with local authorities, etc.).

This statement leads us to the consideration that, in reality, the object is only formally the same. In reality it has changed. In policy transfer the real object consists of the policies and measures of lifelong learning of the country into which the innovations are being introduced. The idea and the original measure disappear and are replaced by the policy decisions, the institutional, managerial and administrative decisions, the ideologies and constructed justifications, the attitudes and ideas that accompany the introduction of innovation in the regional and local context.



This consideration also has consequences for the identification of the subjects of policy transfer. Here the main players change and go back to being those of regional Governance, the management of the systems and of the services which may come to be incorporated, if and when necessary, by the transnational partners. The main policy transfer players are those who should share and participate in the choices to be made regarding the adoption of the new policies and measures (local governments, business partners, regional institutions) and those who should acquire the skills required by the implementation of the innovation introduced.

### **1.4.3. The process and the instruments**

The process of policy transfer is essentially a process whereby an innovation is introduced into a political system. It is only in compulsory policy transfer situations that we find an object assumed to be unchangeable and where the political system into which the innovation is being introduced is called upon to adapt. In our case, however, the original, pre-defined object loses its centrality and attention comes to focus on the process of regional policy making.

In this respect Rose (1993: 30) proposes a categorisation of five different types of learning: at the one extreme is direct copying, where the programme or policy is transferred lock, stock and barrel from one jurisdiction to another; at the other extreme is “inspiration” according to which a policy in one jurisdiction is based on an idea identified in another. In between these two extremes come “adaptation”, “creating a hybrid” and “synthesis”, where “hybrid” implies that the innovation is preceded by aspects of policy or pre-existing measures, “synthesis” that the question is partly of copying, partly adapting policies or measures, and “inspiration” that all that has happened is that some suggestions have been garnered from the experiences of others, and that the policies or measures have then been created without further interrelationships.

To these five types we have added the “co-operative policy transfer”, relating to a method of transfer in which all the governments involved cooperate in the synchronised introduction into their systems of a new policy or measure.

As we have stated previously, in all these cases the process is identified with that of normal policy-making, with the sole difference in respect of co-operative policy transfer that a direct participation of the partners from outside the Region must be involved at some stage in the procedure.

For these reasons we have highlighted the following components of the transfer process as essential:

- Creation of institutional conditions for transfer
- The choice of the process for the transfer (Copying, adaptation, creating a hybrid, synthesis, cooperative model)
- Decision-making process of the transfer
- Implementation of the transfer
- Institutionalisation and follow-up

In Chapter 3 we shall come back to all of the above to provide detailed analysis and empirical references.

Regarding the duration of the process it is important to consider that “policy transfer may take place over more extended time periods. One of the most significant instances of transfer for the modern European state, the “reception” of Roman Law took centuries (Koschaker, 1966). More recently, the adoption of trends such as liberalisation and “new public management” are observed over many years rather than a single point in time (Lawton 1999, Wright 1995). In this respect, Page notes that “the shorter the time period, the more likely an innovation is likely to appear as an alien import; over a longer time period the innovations become domesticated as the relationship between established institutions and policies shapes their development” (Page: 5).

Obviously, all this depends on the complexity of the innovation introduced in the light of the stage of development of the context in which it will operate (eg. demand policy or one of its measures may be imported only if there exists a sufficiently developed supply policy). In our model we entrust to regional policy making the function of protecting the local system from unsuitable transfers, and, at the same time, we have entrusted policy learning with the task of “understanding the conditions under which policies or practices operate in exporter jurisdictions and whether and how the conditions which might make them work in a similar way can be created in importer jurisdictions” (Page:2).

In the matter of the instruments of policy transfer we consider only those directly connected with the function of creating of moral obligations or reciprocal duties of cooperation.

In the European experience of obligatory transfers relating to the pre-access stage of the EU membership candidate countries one of the instruments adopted in labour policy, is, for example, the *Joint Assessment of Employment Policy Priorities (JAP)*. The JAP represents the short-term priorities while preparing for accession,

“an agreed set of employment and labour market objectives necessary to advance the country’s labour market transformation, to make progress in adapting the employment system so as to be able to implement the Employment Strategy and to prepare it for accession to the European Union. The signatures of the JAP represent the main organizations involved in this adaptation process – the DG Employment of the European Commission and the Ministry of Labour and Social Affairs” (Schüttpelz, 2004:15).

The Regional Action Plans prepared by the regional governments responsible for the planning of the European Social Fund have similar characteristics in the sense that they constitute the planning instrument subject to acceptance on the part of the European Commission, which is able to implement the actions and resources provided at the regional scale.

This, however, lies within the framework of compulsory policy transfer, while as far as voluntary policy transfer is concerned, the instrument that may take on a specific supporting function comprises the bilateral or multilateral agreements stipulated between two or more regional governments. The function of this type of instrument is to define reciprocal duties in respect of: a specific policy or a specific measure, the objectives to be sought, the reciprocal tasks which each of the parties assumes, the process that will be followed to implement the agreement, the validity and implementation periods.

Our research suggests that these agreements give rise to successive implementation plans though which the specific reciprocal duties are defined in terms of the support that each party must offer the other, shared tasks (monitoring, assessment, etc.) and the implementation times foreshadowed. Both cases concern instruments that have demonstrated their validity, particularly in the framework of the category types of co-operative policy transfer.

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